



**2018-2019  
Student/Spouse Verification of IRA and/or  
Pension Rollovers**

**SRO19**

*Please Use Black or Blue Ink*

OSU Banner ID ("A" plus 8 digits)							
<b>A</b>							

Student Name: \_\_\_\_\_

The OSU Office of Scholarships and Financial Aid must, by federal regulations, verify the parent information on the 2018-2019 Free Application for Federal Student Aid (FAFSA). **We cannot determine aid eligibility or disburse funds until all requested documents are received and reviewed.** In some cases, we must submit changes in information to the U.S. Department of Education (FAFSA processor); at that time, you will receive communication from our office as well as a Student Aid Report from the FAFSA processor.

**Untaxed Income and Rollovers:**

The difference between the total amount of pensions, annuities and IRA distributions received during a calendar year and the taxable portion is considered untaxed income for financial aid purposes. *Transfer of funds from one account to another (rollover) can be excluded.*

**Do not leave an answer blank. If the response is zero, check the "None" box.**

Calendar Year 2016	Student/Spouse	
	Rollover Amount	None
Of the total <b>IRA distribution</b> from IRS Form 1040 (lines 15a minus 15b) or 1040A (lines 11 minus 11b), <b>list the amount that was rolled over in tax year 2016:</b>	\$ _____ /yr	<input type="checkbox"/>
Of the total <b>pension, annuity distribution</b> from IRS Form 1040 (lines 16a minus 16b) or 1040A (lines 12a minus 12b), <b>list the amount that was rolled over in tax year 2016:</b>	\$ _____ /yr	<input type="checkbox"/>

**Certification/Signature:**

By signing this form, I certify that all the information reported to qualify for federal student aid is complete and correct. **If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.**

\_\_\_\_\_  
**Student's Signature** *(electronic signature not acceptable)*

\_\_\_\_\_  
**Date**

**Return to:**  
Office of Scholarships and Financial Aid  
119 Student Union, Stillwater, OK 74078-5061  
**Fax: (405) 744-6438** *(if you fax, please do not mail the form)*

**Questions?**  
Email: [finaid@okstate.edu](mailto:finaid@okstate.edu)  
Phone: (405) 744-6604  
Web: [financialaid.okstate.edu](http://financialaid.okstate.edu)